CITY OF MORGAN HILL

The City of Morgan Hill

**Request for Proposal
Geographic Information System (GIS) Program Services**

June 12, 2015

Note: Responses to this RFP are due by **June 29, 2015 at 10:00 a.m.**

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Section 1
Executive Summary

Purpose. At the City of Morgan Hill ("City"), geographical information has evolved from a system comprised primarily of paper and edited PDF maps to more reliance on GIS and CAD systems. More recently, the City has been primarily focused on developing and maintaining the GIS as the standard for storing geographical information. Aside from emergency services, the City primarily uses its GIS for geospatial analysis, thematic mapping, asset management, information distribution, and data visualizations. Geospatial data is primarily accessed through desktop GIS (ArcGIS), web-based interactive maps delivered through MapGuide Open Source (intranet), and asset management systems comprised of infraMap/iWater and Sedaru. The City's GIS has evolved overtime to satisfy certain departmental needs, however, is limited by the lack of a comprehensive, enterprise system approach. Some examples include: GIS data is stored in a variety of formats including shapefiles, personal/file geodatabases, and enterprise geodatabase and stored in a variety of locations; GIS web services haven't been developed to more easily connect clients to the data; and resources (personnel time and money) are not being optimized as efficiently and effectively as possible.

The City's goal is to update the current spatial IT infrastructure, storage environment, and delivery of geospatial services to serve a growing need for accessing and delivery of geospatial data to internal and external customers and enable integration with other supported business systems and databases. In the near-term, the City expects that the growing internal business processes and access for the public will be enhanced and extended through web based geospatial services using Environmental Systems Research Institute's (ESRI) ArcGIS platform.

The City of Morgan Hill is issuing this Request for Proposal (RFP) for Geographic Information System (GIS) Program Services. This RFP is intended to gather pertinent information concerning the ability of consulting firms ("Consultant") that can meet the needs of the City. In particular, the City would like a Consultant to assist with the integration of geospatial data and services with the implementation of CRW Systems' TRAKiT Land Management System (permitting and land entitlement system), extend access to geospatial services to the public, and an assessment of City's business processes in relation to the GIS to further develop the GIS at the enterprise level.

Objective. The Consultant shall be a subject matter expert and have proven experience in geospatial services using the most current technology available for the ESRI ArcGIS platform and understand anticipated changes in technology and/or deployment scenarios that the City may benefit from. The consultant shall provide the City expert advice in the architecture, deployment, management and maintenance of web based geospatial services using ESRI's ArcGIS platform and at the City's discretion, assist in the configuration, set-up and delivery of the system. Additionally, the Consultant will evaluate the current geospatial data storage environment; recommend and establish storage scenarios based on the expected geospatial service levels, maintenance and management requirements, security, and access; and at the discretion of the City, assist in the mapping and migration of geospatial data to a newly established storage environment.

At this time, the City anticipates that geospatial services will be provided through stand-alone web based mapping applications and integrated through third party applications. The consultant will primarily be focused on assisting the City to complete its integration with the CRW Systems

TRAKiT Land Management System, which the City is currently implementing in a parallel process. The Consultant shall also make certain through collaboration with City staff, that the system and geospatial services created in the near-term for the TRAKiT system be capable of and easily extended to serve and integrate with other City systems and databases.

The City is seeking a complete response from a Consultant who can demonstrate that they possess the organizational, functional, and technical capabilities to perform the services, and meet or exceed the requirements and service levels specified herein.

Information concerning the City's objectives, current environment, project scope and timeline, requirements, RFP response parameters and evaluation criteria are discussed in the balance of this document.

Clarification of Commitment to Purchase. This RFP is not a commitment to purchase services, and any expenditures experienced by the proposer in preparation and submission of the proposal shall not be reimbursed by the City nor does the City obligate itself with any action taken or cost incurred by Consultant in responding to this Request for Proposal. Further, the City reserves the right to reject all proposals received and not award a contract.

Statement of Rights. The City has the right to:

- Cancel or re-issue the RFP at any time.
- Accept the proposal, proposals or parts of a proposal deemed most advantageous to the City, or to reject any or all proposals for any causes whatsoever as it deems for the best interests of the City.
- Waive any minor informalities or irregularities contained in any proposal.
- Amend the RFP in any manner prior to contract award.
- Reject any proposal which contains false or misleading statements, or is not in compliance with submittal requirements.
- Obtain clarification of any point in a Proposal. Such clarification maybe in any form, such as conference calls, email communications,
- Share the RFP, proposals and subsequent Consultant information with any Consultant of the City's choosing in order to secure expert opinion.
- Make copies of any resultant Proposals for evaluation purposes or as required for legal and regulatory compliance.

Withdrawal of Proposal. A Consultant may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To accomplish this, a written request signed by an authorized representative of the Consultant must be submitted to the RFP Contact. The Consultant may submit another proposal at any time up to the proposal closing date and time.

Errors in Proposal. The City of Morgan Hill will not be liable for any errors in Consultant proposals. Consultants will not be able to alter proposals documents after the deadline for proposal submission. Corrections or amendments due to errors identified in the Consultant Proposal may be accepted if this type of correction or amendment is due to typing, transposition or any other obvious errors. Consultants are liable for all errors or omissions contained in their proposals.

After opening and reading proposals, they will be checked for correctness. If, after the opening and tabulation of proposals, a Consultant claims error and requests to be relieved of award, the

Consultant will be required to promptly present certified work sheets. The RFP Contact will review the work sheets and if the RFP Contact is convinced, by clear and convincing evidence, that an honest, mathematically excusable error or critical omission of costs has been made, the Consultant request may be determined to be accepted.

Contract. Selected Consultant will be required to use the contract provided by the City of Morgan Hill and adhere to the terms stated in the agreement.

Section 2
City of Morgan Hill Profile

The City of Morgan Hill, CA is located in Santa Clara County, approximately 20 miles south of downtown San Jose. The City has a population of approximately 41,197 and covers 12 square miles.

Morgan Hill is a general law city and operates under the Council-Manager form of government. Four council members serve for four-year terms. The Mayor is directly elected to serve a two-year term. The Mayor and City Council serve as the legislative and policy making body of the City. The City Manager, appointed by the Council, serves as chief executive officer and is responsible for the day-to-day administration of City affairs.

Morgan Hill experienced dramatic growth in the late 1960s through the late 1970s, which caused its residents to enact a managed growth voter initiative to ensure that growth of population did not outpace growth in school, sewer, and other infrastructure capacities. Since that time Morgan Hill has grown at a more planned and sustainable pace. Based on current estimates, the City will continue to accommodate growth projections. Growth will likely be at a slower pace in the near-term due to the current economic and market conditions. Over time, Morgan Hill has developed vibrant employment centers and the General Plan calls for additional employment growth, with an overall goal of achieving a balance of jobs and housing so that it is less of a bedroom community.

The City has the following metrics:

Metric	Information
Population (2013 Census)	41,197
Employees	180
GIS Layers	200+

The City provides a full range of services typical of municipal governments including police, fire, planning, building, sewer service, street maintenance, library, park and recreation services, and general administrative services (finance, legal, information technology, and human resources).

Technology Overview. The Information Services Division of the City manages information technology planning and technical support for all City operations. Equipment supported includes approximately 242 personal computers and laptops, 33 virtual servers, 14 physical servers, one storage area network (SAN), five Network-Attached Storage (NAS) devices, one Private Branch Exchange (PBX) phone systems and other associated peripheral equipment required to sustain the City's 10 local and wide area networks, electronic mail, internet access, database administration, and remote access to City information. Specific for GIS, the City maintains the following software (supported on maintenance to enable updates as provided by vendor).

ArcGIS for Server Advanced License
ArcGIS Desktop Basic (9 single users)
ArcGIS Desktop Basic (2 concurrent)
ArcGIS Desktop Advanced (1 concurrent)
Microsoft SQL Server 2008 R2

Section 3
Project Summary

The City of Morgan Hill recently entered into a contract with CRW Systems to migrate from the City's use of Tidemark Advantage (provided by Accela, Inc.) for permit management and tracking to CRW's TRAKiT permit tracking software. The CRW TRAKiT system implementation process is scheduled to begin June 2015 and will extend over the next year. The City has chosen to use the vendor hosted/SAAS version of the software system.

TRAKiT will provide an integrated permit tracking system for Planning, Public Works, Fire and Building processes related to the issue of land use entitlements and code enforcement actions. The permit tracking system also has the capability of including Business Licenses in a single integrated system. Integration of the City hosted GIS will be integrated into TRAKiT in two ways. First, TRAKiT will provide a module to regularly update essential GIS data hosted by the City and used within TRAKiT (parcel records, streets, addresses, etc). Secondly, the mapping viewer provided by TRAKiT will be integrated with map services hosted by the City to display layers of the City's choosing.

With the pending implementation of TRAKiT, the City has realized that the City's GIS requires re-structuring and enhancement to provide for web based GIS services. The Consultant's services would be utilized in the City's implementation of the GIS for CRW's TRAKiT, by providing expertise in GIS data storage, establishing web based GIS services, and the methods for City staff to maintain and manage.

The City also requests the Consultant to evaluate the City's overall GIS needs in relation to other business practices. In 2002, the City completed a GIS needs Assessment/Implementation plan. Issues identified in that study included data currency and availability. The City has been quite successful in building many of the base components required for a comprehensive GIS; however, there remains issues with accessibility both internally and outward facing to the public and integrating GIS into other systems and business practices. The City is also in need of an implementation plan and defining the operational goals, strategies and costs associated with maintaining and enhancing the system. The City's goal was to move towards a central data and/or application server, and that remains the City's goal today.

Section 4
Project Scope and Timeline

As noted, the objective of this RFP is to establish an ongoing relationship with a Consultant to ensure high quality, necessary, timely, and cost-efficient GIS Program Services. The City expects that the Consultant chosen will be experienced in the type of GIS Program Services required by the City on an ongoing basis.

A primary project for the City is the GIS integration with CRW's TRAKiT Permitting and Land Management Software System. In doing this, the City will be looking at the City's overall GIS needs. The scope of work can be summarized as follows:

Phase 1: CRW's TRAKiT Integration

1.   Conduct an evaluation of the current GIS (IT infrastructure, installed software, configuration, etc) and provide deployment scenarios for a GIS server and GIS web services that will integrate with the City's implementation of CRW TRAKiT including hosting on City maintained servers and cloud based solutions. Each scenario shall address overall advantages/disadvantages in relation to the complexity of provisioning the complete system, requirements for configuration, maintenance/management requirements, and address security and access measures in compliance with IS policies, procedures, and as directed by the IS manager.

2.   At the City's discretion, assist in the implementation of the GIS services as determined through Item No. 1.

3.   Provide expertise in determining a geodatabase model and schema for storing and delivering geospatial data that will allow for coordination/integration between the City's and CRW TRAKiT databases and other existing systems used by the City.

4.   Identify core datasets and attributes as required by the CRW TRAKiT system. These may include parcels, street centerlines, and addresses, but shall include all geospatial data critical for the implementation of CRW TRAKiT.

5.   Provide procedures, identify tools/functions, and train City staff in maintaining and updating geospatial data identified in Item No. 4.

6.   Evaluate the current geospatial data storage environment including migrating to a private/public cloud.

7.   Recommend a storage repository(ies) based on the expected GIS service levels, maintenance and management requirements, security, and access. At the discretion of the City, establish and configure storage repository(ies).

8.   At the discretion of the City, assist in the mapping and migration of existing geospatial datasets to the newly established data model and storage repository.

9.   Indentify and develop as needed web based GIS services that will serve the CRW TRAKiT mapping system.

10. At the discretion of the City, identify and develop web maps and applications to enhance or augment those services provided through the CRW TRAKiT system.

Phase 2: City-wide GIS Assessment

1. Deliver a city-wide GIS plan (Enterprise System) that identifies a recommended implementation timeline, the general configuration of equipment, software, data, applications, services, and expertise required. A city-wide assessment was completed in 2002 with some components implemented. Provide strategies that prioritize a pragmatic approach to further develop and enhance the current system.

2. Investigate the availability, accuracy (i.e. address database) and redundancy of existing digital data. Provide a process or procedures maintain and manage the data.

3. Provide recommendations and specifications for data development or acquisition that support City functions and activities.

4. Implement development of GIS services and deliver the data required to support the City functions and activities, as the City determines are necessary. This would likely be implemented in Phases.

5. Train the City staff in maintenance and managing the system to ensure the system operates efficiently and reliably and to accommodate future expansion.

The final scope of the project will be determined based on the immediate need to integrate the GIS with the TRAKiT Permitting and Land Management Software System and budget constraints.

Timeline

The City intends to complete the selection process using the following schedule. However, the City reserves the right to modify or reschedule procurement milestones as necessary.

Event/Task	Date
Release RFP	June 12, 2015
Consultant Questions Due	June 17, 2015 at 5:00 p.m.
Answers to RFP Questions Published to Web Site	June 19, 2015
RFP Responses Due	**June 29, 2015 at 10:00 a.m.**
Consultant Reference Checks	July 6-7, 2015
Decision on Final Consultant	July 8-10, 2015

Section 5
Submittal Requirements

Those Consultants interested in responding to this REQUEST FOR PROPOSAL are required to submit their proposal in the following format. **Strict adherence to the proposal format is required.**

Those submitting sealed proposals should indicate on the outside of the envelope/box in the lower left hand corner that it is a sealed proposal for the RFP – City of Morgan Hill Geographic Information System (GIS) Program Services. The name of the Consultant submitting the proposal should also be indicated on the outside of the envelope/box.

One (1) original and five (5) bound copies, plus two electronic copies copied to a single CD (1 in PDF format and 1 in Microsoft Word format) of the entire proposal are required to be submitted in a sealed envelope/box. Proposals are to be delivered to:

Gina Paolini
Senior Planner
City of Morgan Hill
17575 Peak Avenue
Morgan Hill, CA 95037

Proposals must be received by 10:00 a.m. Pacific Time on June 29, 2015. Proposals received after 10:00 a.m. Pacific Time will <u>not</u> be considered.

All questions regarding this RFP must be in writing and directed to Gina Paolini at the address above or emailed to her at gina.paolini@morganhill.ca.gov by 5:00 p.m. Pacific Time on June 17, 2015**.**

From the issue date of the RFP until contract award is made, respondents are not permitted to communicate with any employee or agent about the subject or contents of the RFP except as outlined in the RFP. Violation of this provision may result in rejection of the respondent's submission. No information provided verbally or by any other personnel will be considered binding. All respondents shall use the RFP and its attachments and amendments as the sole basis for proposal at this time.

Submittal Format

Proposals should be prepared simply, providing a straightforward, concise delineation of the capabilities necessary to satisfy the requirements of the RFP. Technical literature and elaborate promotional materials should not be submitted at this time.

Emphasis in the proposal should be on completeness, clarity of content and adherence to the presentation structure required by this RFP and not on volume. Costs for developing proposals in response to the RFP are the obligation of the Proposer and are not chargeable to the City. All proposals and accompanying documentation will become the property of the City and will not be returned.

The submittal format for the proposal is within the following sections with the required information provided in each section as noted below. For the original and hard copies, the City requests that physical tabs be used to separate each section.

SECTION	TITLE	SECTION CONTENTS
Section 1	**Title Page**	Present the subject of your proposal, the name of your organization, address of the firm/consultant, name of the contact person (with their title and their contact information) and the date.
Section 2	**Table of Contents**	Present a clear and comprehensive identification of the contents of your proposal by section and by page number.
Section 3	**Letter of Transmittal**	A signed letter of transmittal is required. Within this letter include statements to the following: • Your organization's understanding of the work to be accomplished. • That upon award of this contract, your organization will make a positive commitment to perform the implementation work within the scheduled time period. • A summary of the cost of service fee(s) to be charged for the work, and a statement indicating if fees are fixed, complete, inclusive or negotiable. • All proposals submitted are to be valid for period of 180 days after this proposal date. • The name of the individuals who will be authorized to make representations for your organization, their titles, addresses, email addresses and telephone numbers. • A statement that the signatory of the transmittal letter with his/her printed name and title has authority to bind your organization. • Each submitted hard copy of the proposal is to have an original signed letter of transmittal by an official authorized to legally bind the proponent.
Section 4	**Consultant Qualifications, Experience and References**	Provide narratives in the following areas **(Not to exceed 10 pages)**: **A. A profile of your organization is required. The profile should include the following information:** • Basic organizational information, such as, size of consulting firm, how long in business, etc. • Whether your organization is local, regional, national, or international. • The location of the office from which the engagement is to be performed and a brief narration of the number of professional staff (i.e. managers, developers, analysts, etc.) employed at the office. • Describe the range of services provided by the office performing the engagement. • A listing of other similar governmental customers that are using the services. Include a brief summary of your duties and responsibilities for each municipality listed. **B. A Summary of your organization's qualifications:** • Provide a summary of your organization's expertise in the area of GIS Program Services, support, implementation, training, etc. pertaining to the proposal (including any 3rd party systems included as a part of your proposal). • Include at least three (3) references where Consultant provided similar services at other Municipal Government agencies of similar size and complexity. Include contact names, telephone numbers and addresses. Indicate the year and timeframe in which each reference was engaged with your organization. • References – prior customers. Consultants are also asked to submit contact and reference information for two (2) prior customers who are no longer using their services. **C. A Summary of your organization's experience in the following areas:**

SECTION	TITLE	SECTION CONTENTS
		- ESRI ArcGIS web services deployment - ESRI/AutoCAD Integration - Integration of ESRI ArcGIS with other services/systems - GIS Standards and metadata development and execution - Experience with interactive web mapping design on a variety of platforms including all forms of mobile and desktop - Integration with other database management systems - Experience with local government GIS application development - Training
Section 5	Project Organization, Personnel and Staffing	Provide a brief description of all key personnel and technical staff (including vendors, partners or subcontractors) to be involved in this project and their relationship to the services to be provided. - Include names, title, fields of expertise for all proposed personnel and staff - Identify the principal-in-charge for the proposed services - Complete resumes for proposed staff should be provided as part of an appendix to the proposal. - Provide a project organization chart which depicts the project team.
Section 6	Project Approach, Work Plan and Deliverables	Provide a narrative which shows the Consultants understanding of the project and documents a logical technical approach to the project scope of work. Include in general, work plans, as well as the proposed approach to undertaking the scope of work: - Using the scope of work presented in the RFP, propose a work plan detailing major tasks and subtasks and the work to be conducted in each. For each task, detail the number of hours by staff level and hourly rate for each staff level. - If specific project team members or vendors are critical to specific tasks, identify where they will be utilized and/or committed to a task. - Include the results and deliverables expected from each major task. - Identify appropriate assumptions and considerations that could impact the scope and timeline for completing each task. - Provide detailed equipment list for each application area with associated costs (if necessary) - Provide a detailed list of estimated costs and expenses by category. Identify related considerations and assumptions for these expenses.
Section 7	Project Management and Invoicing	Describe how Consultant intends to manage all aspects of the work to be performed including schedules for completion of tasks/subtasks, procedures for scheduling and cost control. The Project Management Proposal must include: - Project kick off meeting - Regularly scheduled project team meetings - Written progress reports - Issue/risk management techniques - Invoicing system to support all work conducted - Deliverables based on invoicing The Consultant will provide billing information: - A copy of the Consultants proposed fee schedule for services provided. - A sample invoice - Summary of the Consultants billing practices - Hourly billing rates for any support personnel - Billing rates for disbursements, such as copying, courier services, fax, supplies, etc. (if any) - Rates charged for travel (if any)
Section 8	Timeline	Based upon the proposed project approach and work plan, provide a detailed project

SECTION	TITLE	SECTION CONTENTS
		schedule that illustrates the duration of each task/subtask and identifies results and deliverable milestones.

Section 6
Evaluation of Proposals

The City's Project Team will evaluate the RFP responses provided by Consultants. The City's Team will consider how well the proposal meets the City's requirements as described in the RFP. It is important that the responses be clear and complete. Based on the evaluation of the RFP responses, Consultants will be requested to participate in due diligence actions.

Evaluation Factors. Selection of finalists will be according to the following criteria:

> - Quality, clarity, and completeness of the proposal.
> - Adherence to requirements for RFP preparation.
> - Consultant viability and strength.
> - Consultants experience on similar projects.
> - Team availability.
> - Project approach, work plan, timeline, deliverables and project management.
> - Understanding of the project.
> - Costs.
> - Customer references.
> - Administrative requirements.

The evaluation factors identified above reflect a wide range of considerations. While cost is important, other factors are also significant. The City may select other than the lowest cost solution. The objective is to choose a Consultant capable of providing the requested services. All proposals will be evaluated using the same criteria.

The City reserves the right to request from any Consultant additional information, interviews, or any other type of clarification of proposal information it deems necessary to evaluate the service proposal.

Reference Checks. The City may choose to do customer reference checks as part of the evaluation process.

Contract Award and Execution. The City reserves the right to make an award without further discussion of the proposal submitted. The City shall not be bound or in any way obligated until both parties have executed the applicable contracts. **The City also reserves the right to delay the contract award, to make a partial award, or not to make a contract award.**

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